

Item Worksheet—Item 3.1

Prepare one Item Worksheet for each Item, capturing the 6–10 most important strengths and opportunities for improvement based on the applicant's response to the Criteria requirements and its key business/organization factors.

(Use the mouse or arrow keys to move from section to section and within a section.)

Indicate the 4–6 most important key business/organization factors relevant to this Item.

(Use the mouse or arrow keys to move to a new key factor. Hitting the Return key will generate an additional number.)

- ✓ 1. SLT gathers student and parent input
- ✓ 2. Requirements: academic excellence; quality curricula and instruction; friendly, supportive and safe learning environment; effective support services; fiscal management
- ✓ 3. Stakeholders: parents, businesses, taxpayers, School Board
- ✓ 4. 84,169 students; 51% white, 31% black, 11.2 Hispanic, 3.5% Asian, 3.3% Native American
- ✓ 5. Elementary, middle and high schoolers
- ✓ 6. Competition: home schooled, private schools

Include an indication of the relative importance/strength of the comment by using ++ or -- as appropriate.

Include a reference to the most relevant key factor(s).

Include an indication of which process evaluation factors are addressed in this comment (refer to page 5 in the full version of the scorebook):

A=Approach

D=Deployment

L=Learning

I=Integration

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+ / ++	Item Ref.	KF Ref.	A/D/L/I	Strengths (Include figure references, as appropriate.)
+	a1 <i>segments</i>	3,4,5,6	A,D	Segmentation includes looking at prospective students, both 18 years old or younger as well as adults. Each subgroup is further divided (e.g., ESL, economically disadvantaged) to that specific and unique needs can be determined.
++	a2 <i>how use</i>	1,2,4	A,D	Individual Education Plans developed for each student based on listening post info and diagnostics e.g., learning disabilities, health, psychological
+	a2 <i>how listen/learn & vary</i>	3,4	A,D	Numerous listening posts identified in Fig. 3.1-3 for key segments
+	a3 <i>how keep current</i>	2	A, L	PDSA used to adjust process e.g., rapidly changing stakeholder needs
- / --	Item Ref.	KF Ref.	A/D/L/I	Opportunities for Improvement (Include figure references, as appropriate.)
-	a1 <i>how determine segments</i>	3,4	A	Although there is a four step process used by the Research and Knowledge Management group to validate existing segments and determine new ones, it is unclear how this is done. For example, gathering, analyzing and integrating information does not describe how the proper segments are determined.
-	a2 <i>segments - receiving schools</i>	3	D	Other than discussions with some local colleges, SHSD outreach to the colleges and universities where their students will go seems limited.
-	a2 <i>how use to encourage persistence</i>	2,4	A	Unclear how the data is use to encourage persistence and reduce voluntary departure (note the enrollment rate is decreasing)

Site Visit Issues (For Stage 3, Site Visit Use)

Applicant Number

Examiner's Initials *AB*

Scoring Range Resulting from Site Visit Findings (From the Scoring Guidelines) _____

Change from Consensus: _____ higher range _____ same range _____ lower range =

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Percent Score *65*%

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1. Elementary, middle school, Special Education, English as a second language, exceptional student program, Learning Choice Center, New Chance for Success, ESL, NCS, Adult Education Program
2. Faculty and staff
3. Technologies, equipment, facilities, information technology infrastructure
4. Professional services
5. Extracurricular activities
6. Support services

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+/++	Item Ref.	KF Ref.	A/D/L/I	Strengths (Include figure references, as appropriate.)
+	3.1.a.1	1,4	A	Figure 3.1-1 illustrates the Student and Stakeholder System. The Research and Knowledge Management Department manages the Segmentation Process. The purpose is to validate existing student and stakeholder groups and identify new or emerging market segments.
+	3.1.a.1	1,3-6	A	The potential core market within the Sandy Hill community for regular and other academic programs consists of all children age 18 and under. The core market is traditionally segmented into four primary groups: current students, former students, alumni, and prospective students.
+	3.1.a.1	1-6	A	In the Segmentation Process, SHSD inputs information and knowledge from federal and state requirements, district businesses and partners, district teams and committees, employees, volunteers, and student feedback into the analysis, validation, and determination of the final segments. The entry of emerging minority group populations, shifts in mobility, enrollment behavior and the unemployment rate is factored into the confirmation of existing segments and identification of emerging segments.
+	3.1.a.1	1-6	A	The Segmentation Process uses criteria analysis to separate key student segments into subgroups for the purpose organizing, data mining, and analyzing student information/data and to meet federal and state APY reporting requirements. They are further segmented by academic program. They are also segmented by school level, grade level, region within the district, and NCLB demographic groups, and economically disadvantaged students.
+	3.1.a.1	1-6	A	There are four non student segments with the SHSD market: parents of students, the school board, taxpayers, and businesses.

++ 3.1.a.2 1-6 A,D

*how listen/learn
to determine
rgmts.*

SAHSD uses a systematic Student and Stakeholder Requirements Determination Process for translating information and data gained through the various listening and learning mechanisms into knowledge that that can be used in planning, performance review, relationship management, curriculum design, and day-to-day management of curriculum and instruction. The Student and Stakeholder Requirements Determination are fully deployed against the district. Figure 3.1-2 illustrates the Student and Stakeholder Requirements Determination Process.

+ 3.1.a.2 1-6 A,D

how use info

Analyzed findings used are information on needs, expectations, organizational knowledge related to requirements is organized by segment and used throughout the district by schools, classroom teachers, professional and support staff, teams and committees to proactively manage student academic performance and stakeholder relationships.

+ 3.1.a.3 1-6 A,D,I

how keep current

The Research and Knowledge Management Department uses PDSA on an annual basis to evaluate the listening/learning approaches and the Student and Stakeholder Requirements Determination Process to keep these processes current with educational needs and directions.

- / - -	Item Ref.	KF Ref.	A/D/L/I	Opportunities for Improvement (Include figure references, as appropriate.)
-	3.1.a.1. 1	A		<p>The prospective students may include students served by other education providers within the district, home-schooled students, or students who are just moving or transferring into the district. The prospective student segment was not targeted for educational programs.</p> <p><i>how include segments currently served by others</i></p> <p><i>prescriptive? outside the criteria? Criteria don't require ed. programs that are specifically aimed at the prospective student segment.</i></p>
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1. ☒ Research Knowledge Management Department used to evaluate learning effectiveness.
2. ☒ Student and Stakeholder Requirements Determination Process, a 5-step process, that consists of data and information collection and knowledge, analysis and integration of data, sharing requirements, use of analyzed findings and using the PDSA to evaluate and make improvements.
3. ☒ Segmentation Process uses criteria to separate key student segments for purpose of data management and analysis.
4. ☒ Learning and listening key communication method.
- 5.
- 6.

NOT KEY FACTORS
THESE ARE APPROACHES

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+ / ++	Item Ref.	KF Ref.	A/D/L/I	Strengths (Include figure references, as appropriate.)
+	a1	1	A/D	Using the Research Knowledge Management Department and its 4-step segmentation process, the applicant validates existing student and stakeholder groups and identifies new or potential market segments. This process allows the applicant to define its core student market for children <18 and the potential adult education market. Students are segmented into 4 primary groups: current students, former students, alumni and prospective students.
++	a1	3	A	Within its segmentation process the applicant utilizes information gained from a number of sources, such as district businesses and partners, district teams and committees, employees, volunteers and student feedback, federal and state defined classifications and reporting requirements in process of confirming the existing segments and identification of emerging segments. Using this process the applicant is able to determine student segmentation by grade level, region, and demographic groups.
+	a2	2,4	A/D	Using a systematic Student and Stakeholder Requirements Determination Process, the applicant gathers and translates the information and data gained through various listening and learning mechanisms into information that is used in its planning, performance reviews, relationship management, curricula and instruction. Fully deployed throughout the district this process uses information gathered from various listening and learning methods which are segmented by populations: current students, former students, alumni, prospective students, parents, school board, taxpayers and businesses. The applicant has thirty-four different listening and learning methods that it uses to gather information. Some of these are focus groups, exit interviews, alumni surveys, meetings with businesses and colleges, parent-teacher conferences and surveys, diagnostic testing, research and enrollment data.

how determine segments

how determine segments

how listen/learn to determine segmts

deployment district wide

segment

how methods vary for different segments



+ a2 2,3
how use info

D

The applicant uses the analyzed findings for needs, expectations and knowledge to proactively manage the student academic performance and its stakeholder relationships. These findings are organized by segment and disseminated throughout the education system including teams and committees.

+ a3 1,3 A
how keep current

The Research and Knowledge Management Department annually evaluates the effectiveness of its listening/learning approaches using the PDSA process in its efforts to keep its processes current with the educational needs and directions.

- / - -

Item
Ref.KF
Ref.A/D/
L/I

Opportunities for Improvement (Include figure references, as appropriate.)

NO OFIs?! score 55%

Site Visit Issues (For Stage 3, Site Visit Use)

Verify the effectiveness of the applicant's Segmentation Process.

Scoring Range Resulting from Site Visit Findings (From the Scoring Guidelines) _____

Change from Consensus: _____ higher range _____ same range _____ lower range

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Percent Score 55

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1. Offers regular K-12 academic programs as well as Special Education, ESL, Exceptional Student Program, Learning choice Center and New Chance for Success
2. Mission: Serve the educational needs of the community by providing safe and people-centered education system that effectively and efficiently manages resources in an equitable manner
3. Student profile: 3.5% Asian, 31% black, 11.2% Hispanic, 3.3% Native American/other, 51% white; 45% disadvantaged
4. Key stakeholder groups: Parents (P), Taxpayers (TP), School Board (SB), Businesses (B)
5. Key requirements:
 Academic excellence (S, P, SB, B)
 High-quality curricula/instruction (S, P, SB)
 Friendly, supportive, safe environment (S, P, SB)
 Effective support services (S, P)
 Effective/efficient fiscal management (TP, SB)

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+ / ++	Item Ref.	KF Ref.	A/D/L/I	Strengths (Include figure references, as appropriate.)
+	a1	2-4	ADL	The applicant's Research and Knowledge Management Department manages the five-step Segmentation Process to validate existing student and stakeholder groups and to identify new or emerging market segments. The first four steps include (1) gathering, analyzing, and integrating related information gathered through various learning and listening methods; (2) validating existing segments and identifying emerging segments and market opportunities; (3) communicating final segmentation through the district; and (4) organization data by segment to meet organizational and NCLB requirements and for input into other processes such as strategic planning, relationship management and curriculum/instruction design.
+	a2	4, 5	AD	The applicant uses a variety of listening and learning methods at varying frequencies (Figure 3.1-3) to determine student and stakeholder requirements and expectations (Figure P.1-2).
+	a2	1-3	ADLI	Curriculum and Instruction Teams use market segmentation data to ensure that the learning needs of different student segments are addressed in curriculum, program and service design.
+	a3	1-3, 5	A	The Research and Knowledge Management Department uses PDSA to evaluate the listening/learning approaches and the Student and Stakeholder Requirements Determination Process on an annual basis. Knowledge gained is posted in K-news.

- / - -	Item Ref.	KF Ref.	A/D/L/I	Opportunities for Improvement (Include figure references, as appropriate.)
-	a1	2	A	Although the applicant collects information on home-schooled students, the applicant does not present evidence that it includes the private-school student segment in its determination of student segments and markets.
-	a3	1-3,5	A	Although the applicant uses PDSA to evaluate and improve its listening/learning approaches and the Student and Stakeholder Requirements Determination (SSRD) Process, there is no evidence that the impact on other processes are considered when improvements are made to the SSRD process.
<p><i>segments</i> <i>- private schools</i> <i>- conflict w. strength</i> <i>how keep current</i> <i>- impact on other processes?</i> <i>prescriptive? Beyond Criteria</i></p>				
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1. Key student segments: regular, special students, ESL, ESP, LCC, and NCS students ✓✓✓✓
2. Student demographics: 3.5% Asians, 31% black, 11.2% Hispanic, 3.3% Native American/other, 51% white, 45% disadvantaged with Region 3 highest disadvantaged (71%) ✓✓✓
3. Four key stakeholder groups: parents, taxpayers, the school board, and businesses; technical and community colleges are both customers and partners ✓✓✓
4. Requirements/KSFs: academic excellence; high quality curricula and instruction, friendly, supportive, and safe learning environment, effective support services, effective and efficient fiscal management and operation ✓✓✓
5. Comparative and competitive data from ASDE, ASBE, USEA, USAEP, AAEP, SAT, PSAT, ESC, USSBO, Junoflower Consortium; Secondary sources: professional membership organizations, Baldrige state and local winners, service industries, transportation industry, school district collaborative ✓
6. Educational delivery is done via classroom, technology-base instruction, educational learning labs, and school-related activities during traditional school calendar as well as summer program offerings ✓

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+ / ++	Item Ref.	KF Ref.	A/D/L/I	Strengths (Include figure references, as appropriate.)
+	3.1a(1)	1,2,3	A	The market Segmentation Process validates existing student and stakeholder groups and identify and emerging market segments in a systematic manner(Fig. 3.1-1). The process gathers the relevant information using numerous methods; validates existing segments and identifies emerging segments and new opportunities; communicates the information to the district; and organizes the information to meet the applicant needs and No Child Left Behind act of 2001 (NCLB). <i>how determine segments</i>
+	3.1a(1)	1,2,3	A	The Segmentation Process uses criteria analysis to separate key student segments into subgroups for the purpose of organizing, data mining, and analyzing student data information/data to meet federal and state Adequate Yearly Progress (AYP) reporting requirements. Current students are further subdivided based by academic program, school level, and NCLB demographic groups. The level of subdivision enables the applicant to determine the requirements of every segment. <i>how determine segments</i>
+	3.1a(1)	1,2,3	A	The applicant has segmented non-students into four groups namely parents of students, the school board, taxpayers, and businesses. Three of these segments are subdivided further so the district will be able to address the diverse needs of every segment more closely. <i>segments</i>
+	3.1a(2)	1,2,3,6	A	The five-step Student and Stakeholder Requirements Determination Process

<i>how listen/learn to determine rgmts</i>	enables the applicant to systematically translate the information gathered into knowledge that <u>can be</u> used in planning, performance review, relationship management, curriculum design, and day-to-day management of curricula and instruction (Fig. 3.1-2).
+ 3.1a(2) 1,2,3,6 A <i>how methods vary</i> <i>use info for instructional progs.</i>	The applicant utilizes a number of different listening and learning methods to solicit input from every stakeholder segment. The needs analysis gathers information to determine academic learning needs based on summative and formative assessments. The individual Education Plans (IEPs) are used in developing the needs of the special education students. This information helps in developing the annual Comprehensive Educational Program (CEP) and the Curriculum/Instruction Delivery Process (Fig. 6.1-1) in a systematic manner.
- / - - Item Ref.	KF Ref. A/D/L/I Opportunities for Improvement (Include figure references, as appropriate.)
- 3.1a(3) 1,2,3,6 L <i>how keep current -</i> <i>- how use for improvement?</i>	Although the Student and Stakeholder Requirements Determination Process (Fig. 3.1-20 shows an evaluation and improvement step, it is not clear how the applicant uses the information for process improvement and developing other services.
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1. **Students:** public school district serving 84,169 students; regular, special education, ESL, ESP, LCC, NCS, 3.5% Asian, 31% Black, 11.2% Hispanic, 3.3% Native Indian, 51% White ✓✓✓✓✓

2. **Stakeholders:** parents, taxpayers, School Board, and businesses. ✓✓✓✓

3. **Key requirements:** academic excellence, friendly/supportive safe environment, high quality curricula/instruction, effective support services, efficient/effective fiscal management of operations ✓✓✓✓

4. **Programs:** academic programs; elementary K-5, middle 6-8, high school 9-12, ESL, ESP and exceptional student program, Learning Choice Center, New Chance for Success, extracurricular activities, adult educational offerings ✓✓✓✓✓

Professional Services: guidance counseling, speech and hearing therapy, health and social work, psychological assistance ✓

Support Services: transportation, food, library, and technology ✓

5. Largest public school in state, 42nd in US, 2% annual growth, project 1.5% growth ✓

6. Main competitor: 16 private schools in the district and home schooling ✓✓

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+ / ++	Item Ref.	KF Ref.	A/D/L/I	Strengths (Include figure references, as appropriate.)
+	3.1a(1)	1,5,6	A	As a public school, the applicant targets all children 18 or under in its geographical region. It systematically validates existing student and stakeholder groups, and identifies new or emerging market segments through the Segmentation Process. Within its core market, the applicant segments students into current, former, alumni, and prospective, with further segmentation by program, school group, and demographic groups.
+	3.1a(2)	1,5,6	A,L,I	Figure 3.1-3 illustrates multiple listening and learning methods for the different student segments (current, former, alumni and prospective) and stakeholders. The applicant uses a systematic approach for determining student/stakeholder requirements through the Student Stakeholder Requirements Determination Process which translates information and data obtained through the listening learning into knowledge used for planning.
++	3.1a(2)	1,2,3	A,D,L,I	The applicant's Student Stakeholder Requirements Determination Process demonstrates integration – data and information from assessments, interviews, surveys, conferences, focus groups are analyzed and integrated into SPP, CEP – development of instructional programs, services, as well as the Relationship Management Process. Current and emerging requirements are deployed to all divisions, departments, schools and stakeholders through the various

how keep current

communications methods Figure 1.1-2. *Learning-* demonstrated through the review and evaluation/improvement cycle. Improvements involving student input in the curriculum instruction design and delivery process sited.

+ *how keep current*

3.1a(3) 1,2,3,6 A,L,I The applicant's Research and Knowledge Management Department uses PDSA on an annual basis to evaluate the listening/learning approaches and the Student and Stakeholder Requirements Determination Process to keep these processes current with educational needs and directions.

- / - -	Item Ref.	KF Ref.	A/D/L/I	Opportunities for Improvement (Include figure references, as appropriate.)
-	3.1a(1)	1,5,6	A	It is not clear how the applicant targets student segments currently served by other educational providers. As identified by the applicant, there are 16 private schools as well as home schooled children in its district.
-	3.1a(1,2)	1,3,4	A,L	While the applicant segments the students into a number of groups, it was not evident that the applicant identifies the impoverished students as a specific segment to learn more about their requirements. The applicant identified this group as a strategic challenge in its organizational profile as well part of its strategic plan.
-	3.1a(2)	1,2,3	A	It is not clear how the applicant determines the relative importance of the student/stakeholder requirements to decision making for enrollment.

how target students of other providers

conflict w. strength - resolve

segments impoverished students? so what

how determine relative importance of reqmts

Site Visit Issues (For Stage 3, Site Visit Use)

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Percent Score 55%

MN

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- | | |
|---|--|
| 1. Vision, mission, and values; creating a learning community | 4. Competitors |
| 2. Diversity – students and community | 5. Curricula and program development |
| 3. Student and stakeholder requirements | 6. Pace of change and mobility; “from” and “to” destinations of students |

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+ / ++	Item Ref.	KF Ref.	A/D/L/I	Strengths (Include figure references, as appropriate.)
+	3.1a(1)	2,4	A/I	The district uses a systematic process for determining meaningful segments for students and stakeholders. The steps include: gathering and analyzing data from a variety of listening posts; validating current and identifying emerging segments; communicating the segmentation; organization information for use in the strategic planning, relationship management, and curriculum design and delivery processes.
+	3.1a(2)	3,5	A/L	The district uses their Student and Stakeholder Requirements Determination Process for gathering segment requirements and employs varied types of listening methods for each segment as shown in Figure 3.1-3.
+	3.1a(2)	1,3,5	A/I	The segmentation and requirements data is used in the Strategic Planning Process to drive development of the Comprehensive Education Plan.
+	3.1a(3)	6	A	The district uses the PDSA process to evaluate and improve the Stakeholder Requirements Determination Process and the related processes for Curriculum and Instruction Design and Delivery.

-/-	Item Ref.	KF Ref.	A/D/L/I	Opportunities for Improvement (Include figure references, as appropriate.)
- <i>Segments - receiving schools</i>	3.1a(1)	2,3	A/L	While there is recognition in multiple places in the application and in Figure 3.1-3 that college is the next step for many graduating students, it is not clear why colleges (admissions) are not considered a stakeholder segment. <i>prescriptive</i>
- <i>use of info - rewrite to include planning/marketing?</i>	3.1a(1)	5	A	It is not clear how the district links student segments to the programs it will market.
- <i>how methods vary - how decide?</i>	3.1a(2)	2,3	A	While it is clear that listening/learning methods vary by eight key segments, it is not clear how the district makes decisions about what methods to use for the different segments. <i>beyond Criteria</i>
- <i>how listen/learn</i> <i>prescriptive/beyond Criteria</i>	3.1a(2)	6	A	There is anecdotal evidence of use of increased student input being used to improve student learning groups (cooperative learning, peer tutoring, and lab partners). While this story tells of improvements in a specific program, there is no evidence that a broader decision was made about the involvement of students and stakeholders in process improvement of the listening and learning processes.
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Percent Score 50